Green in '14!

SECGC

State Employees' Charitable Giving Campaign

Department of Administration
State Human Resources Division
P.O. Box 200127
Helena, Montana 59620

MONTANA STATE EMPLOYEES' CHARITABLE GIVING CAMPAIGN APPLICATION INFORMATION FOR INDEPENDENT NON-PROFIT ORGANIZATIONS

The State Employees' Charitable Giving Campaign (SECGC) welcomes your interest in our 2014 campaign. We are a service to state employees, who are very generous donors to non-profit organizations and to their communities. We welcome and encourage your participation. As a part of the service to employees, we must make sure that applying organizations meet the eligibility requirements of the campaign and provide the following information to assist applicants. We welcome questions as you consider applying or as you are gathering the information we need. For any questions, contact information is in sections VII and VIII below.

I. General Information. Your organization is invited to apply for the 2014 SECGC. This campaign is the only authorized charitable solicitation of state employees in the workplace. Through the campaign, state employees donate to a wide variety of non-profits using payroll deduction, credit or debit cards, checks or cash. In 2013, state employees donated more than $445,200. While there were some non-profits that received no contributions, the largest total of pledges and gifts to a single non-profit was $33,170 and the average individual state employee pledge amount was $243.

The campaign is administered by the Department of Administration with the assistance of a Governor-appointed advisory council (Advisory Council) of volunteer state employees, a Financial Services Coordinator and a Program Coordinator and representatives of federations and independent participants.

II. Eligibility Requirements. To apply for the 2014 SECGC, each non-profit must adhere to the following requirements:

A. Each non-profit must be, or be a program directly managed by, an organization that has tax exempt status granted by the IRS under 26 USC 501(c)(3) or has such status granted by an act of Congress.

B. Each non-profit must:
   1. Be in compliance with all federal, state and local laws and ordinances.
   2. Account for its funds in accordance with generally accepted accounting principles (GAAP).
   3. Use at least 70 percent of the funds raised from the campaign for the benefit of the people of Montana. If this is not the case, you must demonstrate in writing to the satisfaction of the Department of Administration and the Advisory Council that there is a substantial return or benefit to the people of the state.

4. Have an active Montana telephone number or website listed under the name of the organization.
5. Be directed by an active and responsible governing body whose members have no material conflict of interest and a majority of whom serve without compensation.
6. Conduct publicity and promotional activities that are truthful and non-deceptive based on actual programs and operations including all material facts and making no exaggerated or misleading claims.
7. Use the funds contributed by state employees for its purposes described in campaign materials.
8. Have a written policy and procedure of nondiscrimination in regard to race, color, religion, national origin, disability, age, marital status, or sex for the purpose of service, employment, membership or leadership.
9. Not share or sell names or addresses of state employee donors to anyone.

III. Application and Agreement. By signing the Application and Agreement, each non-profit agrees to:

A. Certify that it meets the eligibility requirements in section II above.
B. Indemnify the state, its officials, agents and employees as required in the Application and Agreement.
C. The Department of Administration's selection of a Financial Services Coordinator and a Program Coordinator to act on your behalf and to be paid by each non-profit and federation as described in paragraph 5 of the Application and Agreement.

IV. Approval to Participate and Appeals.

A. The Advisory Council reviews all applications.
B. On the request of the Department of Administration and/or recommendations of the council, a non-profit organization must provide documentation to substantiate any of the above items certified by the non-profit.
C. The Advisory Council recommends approval or denial to the Department of Administration. Applicants are notified of the outcome by regular or electronic mail.
D. Applicants may appeal denial in writing within 10 working days to the Department of Administration at the same address used for applications. A decision on the appeal will be made within 10 working days.
E. Approval for prior campaigns does not guarantee future eligibility.
F. No organization or program may be listed more than once in the campaign materials. For example, if a program is listed under a Human Resources Development Council, it may not be listed under a United Way.

V. Conduct of the Campaign.

A. Volunteer state employees conduct the campaign. Direct contact by organizations with employees is regulated to minimize workplace disruption and ensure equal access. Non-profits may post materials on public bulletin boards indicating that state employees may donate through the campaign. Removing other organizations' materials will result in disqualification.
B. Non-profits may be asked to help with training, campaign promotion or other events.

C. The campaign produces a single Giving Guide with information about all participating organizations and a single pledge form. Non-profits may not distribute their own fundraising materials in the workplace.
D. The Advisory Council sends thank-you letters to donors listing the non-profit organization and amount pledged/donated to that organization.
E. Employees may indicate on the pledge form whether or not they want contributors notified of their gift.
F. The campaign will not, without clear permission from the state employee, disclose his or her name, address, designation or any other information related to the campaign.

VI. Financial Information.

A. The application fee for the 2014 campaign is $40 per non-profit. This fee must be submitted with the application and is **not refundable**.
B. State employees may designate contributions to your non-profit. Undesignated contributions, campaign expenses and uncollectible pledges are allocated among all participants based on a percentage share of gross campaign receipts.
C. The Financial Services Coordinator will make all distributions using direct deposit (electronic fund transfer) to the organization's financial account. The appropriate authorizing forms are a part of and must be submitted with the Application and Agreement.
D. The Financial Services Coordinator will pay all designated **cash contributions** by May 1 of the year following the official end of the campaign, less participants' share of projected expenses at that time. If May 1 falls on a weekend, the payment will be made on the prior business day.
E. The Financial Services Coordinator will distribute all other **payroll deduction contributions,** less participants' share of projected expenses**,** no later than May 1, August 1 and November 1. The final quarterly payment will be distributed, less uncollectible and final expenses, within 10 working days following the campaign audit, but no later than April 1. The Financial Services Coordinator will send out a report on final distribution of campaign revenues and expenses.

VII. Department of Administration.

A. The Department of Administration is the final authority in the interpretation of any rules, policy, contracts, eligibility and any other matters relating to the State Employees' Charitable Giving Campaign.
B. Alternative accessible formats of this document are available on request. Persons who need an alternative format of this document or who require some other reasonable accommodation in order to participate in this process may contact the campaign at:

Phone: (406) 444-3871
Fax: (406) 444-0703
TTY Relay Service: 711
Email: hbetts@mt.gov
Internet: http://hr.mt.gov/newprograms.mcpx

VIII. Other Contacts. The Advisory Council and the many generous campaign volunteers welcome and encourage the broadest participation possible in the campaign. If you have any questions about the campaign, eligibility, the application process or suggestions to improve the campaign, we welcome your calls or emails. Feel free to contact:

Mike Manion, Chair (tel. 406-444-3310, email: mmanion@mt.gov)
Marie Matthews, Eligibility Chair (tel. 406-444-9407, email: mmatthews@mt.gov)
Alison Munson, Program Coordinator (Phone 406-442-4360, email: alison@unitedwaylca.org)

Required Document Checklist for Independent Application:

- ☐ Completed and signed Application and Agreement.
- ☐ Copy of IRS Determination Letter verifying 501(c)3 status.
- ☐ Copy of their Montana Secretary of State's web page that shows organization is currently registered to do business. Print and attach the page that shows the words **"Active Status"** and date **"Last AR Filed"**; (See sample attached).
- ☐ Check for application fee of $40.00 made out to State Employee Charitable Giving Campaign (SECGC)

A. Complete applications must be received by 4:30 p.m., May 2, 2014. Applications received after May 2, 2014 may be denied.

B. Please return all application materials by the May 2, 4:30 p.m. deadline to:

State Employees' Charitable Giving Campaign
Department of Administration
State Human Resources Division
mailing address: P. O. Box 200127, Helena, MT 59620-0127
or hand-delivery address: Mitchell Building, 125 North Roberts, Room 125, Helena, Montana
(406) 444-3871

THANK YOU FOR YOUR INTEREST IN THE CAMPAIGN.